

COUNTY EXECUTIVE'S 2008 BUDGET

DEPT: DEPARTMENT ON AGING

UNIT NO. 7900
FUND: General - 0001

OPERATING AUTHORITY & PURPOSE

Under the Older Americans Act, the Milwaukee County Department on Aging is a Federal/State designated Area Agency on Aging for Milwaukee County. The Department on Aging's responsibilities are outlined in Chapter 53 of the General Ordinances of Milwaukee County and include planning, developing, providing, purchasing and coordinating services for the County's older adult population. The Department reports directly to the County Executive and provides staff support to the Milwaukee County Commission on Aging.

This Department provides a single entry point for older adults and their caregivers who are in need of elderly service information and assistance throughout Milwaukee County. Services provided by the Department on Aging are designed to provide an appropriate mix of community-based care and direct services to prevent the inappropriate and costly institutionalization of older adults. The Department is the designated Resource Center and Care Management Organization for older people in Milwaukee County under the State of Wisconsin's Family Care initiative.

BUDGET SUMMARY				
Account Summary	2006 Actual	2007 Budget	2008 Budget	2007/2008Change
Personal Services (w/o EFB)	\$ 4,534,959	\$ 4,570,036	\$ 4,843,480	\$ 273,444
Employee Fringe Benefits (EFB)	2,595,621	3,248,090	3,268,837	20,747
Services	478,684	803,744	834,479	30,735
Commodities	1,154,994	1,278,899	1,214,483	(64,416)
Other Charges	6,746,517	6,837,918	6,683,912	(154,006)
Debt & Depreciation	0	0	0	0
Capital Outlay	85,686	300,000	304,325	4,325
Capital Contra	0	0	0	0
County Service Charges	5,105,697	4,162,440	4,877,008	714,568
Abatements	(3,229,584)	(2,020,117)	(2,265,463)	(245,346)
Total Expenditures	\$ 17,472,574	\$ 19,181,010	\$ 19,761,061	\$ 580,051
Direct Revenue	1,455,454	1,680,388	1,206,775	(473,613)
State & Federal Revenue	14,851,923	14,456,604	14,893,068	436,464
Indirect Revenue	0	0	0	0
Total Revenue	\$ 16,307,377	\$ 16,136,992	\$ 16,099,843	\$ (37,149)
Direct Total Tax Levy	1,165,197	3,044,018	3,661,218	617,200

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ADDITIONAL COSTS NOT INCLUDED IN TAX LEVY*				
Account Summary	2006 Actual	2007 Budget	2008 Budget	2007/2008Change
Central Service Allocation	\$ 323,441	\$ 0	\$ 0	\$ 0
Courthouse Space Rental	0	0	0	0
Tech Support & Infrastructure	337,945	299,393	0	(299,393)
Distribution Services	8,412	6,571	0	(6,571)
Telecommunications	32,855	24,468	0	(24,468)
Record Center	8,740	7,656	0	(7,656)
Radio	0	0	0	0
Computer Charges	3,636	979	0	(979)
Applications Charges	289,254	181,698	0	(181,698)
Apps Charges - Network	0	0	0	0
Apps Charges - Mainframe	0	0	0	0
HRIS Allocation	24,209	26,067	0	(26,067)
Total Charges	\$ 1,028,493	\$ 546,832	\$ 0	\$ (546,832)
Direct Property Tax Levy	\$ 1,165,197	\$ 3,044,018	\$ 3,661,218	\$ 617,200
Total Property Tax Levy	\$ 2,193,690	\$ 3,590,850	\$ 3,661,218	\$ 70,368

** In 2006 and 2007, these costs were included in other charging departmental and non-departmental budgets. They were reflected here to show the "total" amount of tax levy support for this Department. In 2008, these costs are budgeted within the receiving department to show the tax levy cost in the department.

PERSONNEL SUMMARY				
	2006 Actual	2007 Budget	2008 Budget	2007/2008Change
Personal Services (w/o EFB)	\$ 4,534,959	\$ 4,570,036	\$ 4,843,480	\$ 273,444
Employee Fringe Benefits (EFB)	\$ 2,595,621	\$ 3,248,090	\$ 3,268,837	\$ 20,747
Position Equivalent (Funded)*	1.0	88.3	89.4	1.1
% of Gross Wages Funded***	95.6	100.0	97.0	(3.0)
Overtime (Dollars)**	\$ 50,024	\$ 43,738	\$ 43,738	\$ 0
Overtime (Equivalent to Position)	1.0	1.2	3.0	1.8

* For 2006 Actuals, the Position Equivalent is the budgeted amount.

** Delineated for information. (Also included in personal services.)

*** Prior to 2008, Aging and Care Mangement Organization were reported together. This table reflects the change in reporting.

PERSONNEL CHANGES				
Job Title/Classification	Action	Number of Positions/ Total FTE	Division	Cost of Positions (Excluding Social Security & Fringe)
Human Srvc Wrkr (Aging)	Abolish	11/11.0	Resource Center	\$ 0*
Human Srvc Wrkr Aging B/L Sp	Abolish	1/1.0	Resource Center	0*
RN 2 Dept on (Aging)	Abolish	1/1.0	Resource Center	0*
Prog Coord (Resource Center)	Create	1/1.0	Resource Center	0**
			TOTAL	\$ 0

* These positions were unfunded in 2007, and are abolished in 2008 for no fiscal effect.

** This position is created without funding in 2008, and will not be filled unless funding is identified.

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ORGANIZATIONAL COST SUMMARY					
DIVISION		2006 Actual	2007 Budget	2008 Budget	2007/2008 Change
Administration	Expenditure	\$ 2,324,371	\$ 1,864,153	\$ 2,265,463	\$ 401,310
	Abatement	(2,284,472)	(1,866,776)	(2,265,463)	(398,687)
	Revenue	1,535	162,000	0	(162,000)
	Tax Levy	38,364	(164,623)	0	164,623
Area Agency: Elderly Services	Expenditure	\$ 3,827,769	\$ 3,631,256	\$ 3,402,869	\$ (228,387)
	Abatement	(143,829)	(9,005)	0	9,005
	Revenue	3,191,401	3,262,972	2,964,689	(298,283)
	Tax Levy	\$ 492,539	\$ 359,279	\$ 438,180	\$ 78,901
Area Agency: Senior Meal Program	Expenditure	\$ 4,605,547	\$ 4,686,219	\$ 4,731,045	\$ 44,826
	Abatement	(136,307)	(2,090)	0	2,090
	Revenue	4,686,270	4,691,121	4,766,262	75,141
	Tax Levy	\$ (217,030)	\$ (6,992)	\$ (35,217)	\$ (28,225)
Area Agency: Senior Centers	Expenditure	\$ 1,375,137	\$ 1,643,528	\$ 1,647,359	\$ 3,831
	Abatement	0	0	0	0
	Revenue	0	0	0	0
	Tax Levy	\$ 1,375,137	\$ 1,643,528	\$ 1,647,359	\$ 3,831
Resource Center: Community Alternatives & Intervention Services	Expenditure	\$ 8,480,609	\$ 9,243,626	\$ 9,811,820	\$ 568,194
	Abatement	(664,983)	(142,246)	0	142,246
	Revenue	8,347,791	7,888,554	8,174,797	286,243
	Tax Levy	\$ (532,165)	\$ 1,212,826	\$ 1,637,023	\$ 424,197

MISSION

The mission of the Milwaukee County Department on Aging is to affirm the dignity and value of older adults of this County by supporting their choices for living in or giving to our community.

DEPARTMENT DESCRIPTION

The Milwaukee County Department on Aging was created in the 1991 budget to serve as Milwaukee County's designated Area Agency on Aging under the Older Americans Act and as the County's designated unit to administer aging programs. The Department plans for and services the growing needs of Milwaukee County's large and diverse older adult population. It is the one dedicated, specialized agency within Milwaukee County government to represent and serve the needs of the elderly.

The Department integrates several Federal and State revenue streams including the Older Americans Act, the Senior Community Services Program, Specialized Transportation Assistance Program for Counties (S85.21), the Alzheimer's Family and Caregiver Support Program (AFCSP), Base Community Aids (BCA) and Family Care.

The Department is the designated Aging Resource Center and Care Management Organization (CMO) for older people in Milwaukee County under the State of Wisconsin's Family Care initiative. Family Care replaces the state's numerous Long Term Support programs, including the Community Options Program (COP), COP Waiver, and Community Integration Program (CIP) with a single, integrated Long Term Care entitlement program.

The Department on Aging consists of four service areas:

Administration includes the Director's Office and the Fiscal and Support Services Division. The major functions of the Fiscal and Support Services Division include budget development and management, accounting and personnel administration. The Division monitors Departmental expenditures and revenues, reviews audits, reports service utilization and expenditures to County and State agencies, projects revenues and expenditures and monitors compliance with funding source requirements. This Division also develops the Department's fiscal

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policies and assesses operations for effectiveness and efficiency.

Area Agency Services provide a comprehensive network of support services through community-based agencies that assist older adults to remain independent in their homes as long as possible. These programs are funded through the Older Americans Act and State revenue earmarked for elderly services. The Division is responsible for planning, research and program development. In addition, unit staff solicit, monitor, evaluate and administer contracts for a variety of services in the community. Staff assist with contract development and coordinate the request for proposals process with other County departments.

The Area Agency Services Division provides staff support to the Milwaukee County Commission on Aging, its five standing committees and its Advisory Council. Division staff assist the Commission in conducting public hearings and needs assessments as required under Federal statute, provide technical assistance and serve as a resource for businesses, universities and voluntary organizations interested in meeting the needs of older adults in the community.

The Senior Meal Program part of the Area Agency Services Division, is funded under Titles III-C-1 and III-C-2 of the Older Americans Act and other State and Federal funds received from the State of Wisconsin Bureau on Aging and Long Term Care Resources. The program receives reimbursement for eligible elderly meals from the United States Department of Agriculture (USDA).

The purposes of the Senior Meal Program are:

1. To provide older persons, particularly those with low incomes, low-cost, nutritionally sound meals in strategically located congregate sites. One of the 31 meal sites offers weekend meals to program participants. The program also seeks to reduce the social isolation of participants by providing supportive services including recreation, transportation, education and information about other programs and services available to older adults.
2. To provide home-delivered meals five to seven days a week to eligible frail, homebound, older adults. The program assists older adults in remaining independent and living within their

own homes and provides limited gap-filling services in addition to meals.

The **Resource Center** Division acts as the entry point for the Department's Family Care and all other benefits and is responsible for arranging short-term assistance for older adults with immediate or pressing needs. It is the primary source of quality information and services for persons 60 years of age and older.

As a major component of the State of Wisconsin Family Care initiative, this Division has four primary functions: (1) to provide Milwaukee County's older adults, their caregivers and the general public one central number to call for information about programs and services 24 hours a day; (2) to provide pre-admission counseling to elders seeking residential placements; (3) to determine eligibility for the Family Care benefit; and (4) to provide community education to older adults, their families, and caregivers on a broad range of subjects, including wellness and prevention of functional decline. The Resource Center's other major responsibilities include investigating allegations of elder abuse and providing protective services, guardianships and protective placement services to vulnerable older adults.

The **Care Management Organization (CMO)** Division operates the Family Care Program in Milwaukee County. This Division is detailed in a separate narrative in 2008.

BUDGET HIGHLIGHTS

- Personal Services expenditures without fringe benefits increase by \$273,444, from \$4,570,036 to \$4,843,480.
- Total expenditures increase by \$580,051, from \$19,181,010 to \$19,761,061, due primarily to increases in Personal Service costs and as a reflection of tax levy being distributed to departments for charges that were formerly abated. Total revenues decrease by \$37,149, from \$16,136,992 to \$16,099,843.
- In 2008, the CMO budget is presented in a separate narrative. This change recognizes the CMO's continued growth and distinctive programming, and addresses the potential expansion of the Family Care program to include

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persons with disabilities under the age of 60, which may result in the creation of a new department or division in the 2009 Budget. The CMO remains under the authority of the Department on Aging in 2008.

- Departments have the authority to fill unfunded positions provided they do not incur a salary deficit.
- ECP positions are not provided step increases or performance awards in 2008 as allowed in County Ordinance Section 17.265 (3).
- The abatement of Countywide crosscharges is discontinued in 2008. The tax levy previously held in the servicing department is redistributed to the recipient departments in an amount corresponding to the crosscharges. This results in a tax levy redistribution equal to the change in abatements. Due primarily to this change in methodology, direct tax levy for this department increased \$617,200. The actual change in tax levy for this department from 2007 is an increase of \$70,368.
- All departments are required to operate within their expenditure appropriations and their overall budgets. Pursuant to Section 59.60(12), Wisconsin Statutes, "No payment may be authorized or made and no obligation incurred against the county unless the county has sufficient appropriations for payment. No payment may be made or obligation incurred against an appropriation unless the director first certifies that a sufficient unencumbered balance is or will be available in the appropriation to make the payment or to meet the obligation when it becomes due and payable. An obligation incurred and an authorization of payment in violation of this subsection is void. A county officer who knowingly violates this subsection is jointly and severely liable to the county for the full amount paid. A county employee who knowingly violates this subsection may be removed for cause."

ADMINISTRATION

- Rental space expenditures increase \$63,737 due to a contractually negotiated five-year lease. 2008 is the third year of this lease.

- Telephone charges increase \$29,800 based on actual expenditures.
- The Budget Manager (Aging) deployed to the Department on Aging in 2007 from the Department of Administrative Services is re-deployed half-time to DAS-Economic & Community Development. The position will remain deployed half-time to the Department on Aging.

AREA AGENCY SERVICES

The Area Agency Services Division consists of three major program areas: Elderly Services, the Senior Meal Program and the Senior Centers.

- 1.0 FTE vacant position of Program Coordinator – Aging unfunded in 2007 remains unfunded in 2008.
- Department on Aging Area Agency Services Division continues to plan, implement and monitor private fund-raising strategies in collaboration with the Commission on Aging and its Advisory Council.

Elderly Services

- Revenues decrease \$298,283, primarily due to the end of a 4-year grant of \$276,566 for the Robert Wood Johnson Foundation Community Partnerships for Older Adults, including local community match from the Helen Bader, Faye McBeath and Greater Milwaukee foundations for the Connecting Caring Communities project. Work continues through the strengthening of the system of long term care resulting from implementation of multiple program innovations developed, nurtured and supported through partnerships provided under this project grant. Robert Wood Johnson and related matching revenue reductions are completely offset with expenditure reductions primarily related to conferences, printing, and elimination of \$243,251 for related contracts in purchase of services and \$23,100 in professional services.
- Other purchase of service decreases include \$9,000 for housing inventory and \$34,220 in state Medicare Modernization funds, partially offset by increases of \$4,500 for outreach, counseling and advocacy services, \$28,628 for

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individualized transportation and \$7,099 for senior center program services.

Senior Meal Program

	2007	2008	2007/2008
	<u>Budget</u>	<u>Budget</u>	<u>Change</u>
Number of Meal Sites Open	31	31	0
Meals Served at Meal Sites	365,672	348,522	(17,150)
Home-Delivered Meals	284,556	272,945	(11,611)
Total Meals Served	650,228	621,467	(28,761)

- Meal sites remain at 31 in 2008, unchanged since 2006. The Department, in conjunction with the Advisory Council of the Commission on Aging, will evaluate the Senior Meal Program to determine the appropriateness of the number and the current locations of meal sites and will make recommendations concerning future site adjustments as part of the 2007-2008 Milwaukee County Area Plan for Older People, for implementation in 2009.
- Home-delivered and congregate meals continue to project a slight decline in 2008 based on 2006 and 2007 experience.
- Revenues increase \$75,141, primarily due to an increase of \$146,087 in Title III C1 and \$31,212 in NSIP funds, partially offset by reductions of \$5,361 in Title III C2, \$42,377 in other program reimbursements, and \$54,420 in participant donations.
- The Senior Meal Program continues, at no additional cost to seniors, the Commodity Supplemental Food Program (administered by the Hunger Task Force) and the Reach Program (administered by Second Harvest). These programs enable participants at various meal sites to receive food boxes each month.

Senior Centers

- In 2008, a \$300,000 appropriation is continued to address the maintenance needs of the County-owned Senior Centers. Projects will be funded based on long-range capital and

operating plans as established in 2006 and updated on an annual basis. The Committee on Finance and Audit shall continue to review and approve facility maintenance plans prior to the expenditure of these funds.

- The Department continues to fund a Purchase of Service contract for the operations of the Senior Centers in the amount of \$1,258,867, the same amount as 2007.
- The Department on Aging continues to seek grant funding and partnerships to sustain and expand fitness and physical activity programming at the Senior Centers.

RESOURCE CENTER: COMMUNITY ALTERNATIVES & INTERVENTION SERVICES DIVISIONS

	2007	2008
	<u>Budget</u>	<u>Budget</u>
Family Care Applications	2,000	2,000
Functional Screens	3,500	3,500
Information Contacts	160,000	120,000

- Expenditures increase \$710,440, primarily due to an increase of \$131,473 in personal services, \$21,000 in purchase of services and the reallocation of County charges previously abated in Department budgets.
- Two (2.0 FTE) Human Service Workers unfunded in 2007 remain unfunded in 2008. The Department also creates 1.0 FTE unfunded Program Coordinator (Aging). The Department retains authority to hire these positions should additional revenue for outreach expansion be identified in 2008.
- Eleven (11.0 FTE) positions of Human Service Worker (Aging), 1.0 FTE position of Human Service Worker Bilingual Spanish, and 1.0 FTE position of Registered Nurse 2 (Aging) unfunded in 2007 are abolished in 2008. These positions are all vacant.
- Revenues increase \$286,243, due primarily to an increase in 100% time reporting for Functional Screens and I&A revenues, offset by

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a slight decrease in Income Maintenance reimbursement of \$1,721.

- DHHS – Economic Support Staff will deploy 20.0 FTE Economic Support Specialists, two Office Support Assistant 2 positions, and two ESS Supervisors to perform eligibility and related functions for the Family Care Program.
- Departmental grant funding increases \$61,750 due to a grant from Blue Cross Blue Shield to develop a collaborative relationship between the Resource Center and Medical College of Wisconsin for development of innovative, education/information modules to promote timely recognition, response and referral of suspected cases of elder abuse and neglect. Project

results will serve as a model, reflecting evidence based programs that can be adapted to other providers and counties for replication in other communities and institutions. The project will develop and test tools to help clinicians reliably detect elders who are at high risk or are victims of maltreatment.

CARE MANAGEMENT COORDINATED SERVICES DIVISION (CARE MANAGEMENT ORGANIZATION)

- In 2008, the Care Management Organization (CMO) is reported in a separate budget narrative. The CMO remains under the authority of the Department on Aging in 2008.